

High Level Weatherization Process List Activities

- Outreach
- Client eligibility determination (document)
- Dwelling eligibility determination (document)
- Notification of eligibility/non-eligibility
- Combustible Appliance Safety check (document)
- Dwelling Assessment
- Scheduling
- Crew time tracking
- Measure Installation
- Order materials – special order
- Landlord/property management coordination
- Multi-dwelling assessment
- Check stock/stock materials
- Property owner waiver – landlord/agent tracking
- Issue materials
- Appliance ordered/delivered
- Coordinate with heating & cooling services
- Coordinate with utility
- Permits and local building inspectors
- Title 24
- 3rd party inspection
- Post weatherization inspection
- Quality assurance
- Callbacks
- Client education
- Job/work order
- Vendor coordination (subcontractor)
- Leveraging
- Satisfaction survey
- Deferral/denials/void
- Appeals

Weatherization Outreach/Marketing Detail

Client or dwelling identified for eligibility determination

- Senior Centers
- Flyers
- Newspaper ads
- Adult day care centers
- Head Start centers
- Food bank/food distribution centers
- Senior lunch (gets client name, address, phone)
- Remote locations/communities (e.g. reservations, etc)
- Referrals from other agencies/utilities/WIC/Programs/Clients
- Call-ins
- Workshops (do applications)
- Use GIS info to target specific areas
- Website
- Radio
- TV
- Walk-ins
- Job fairs
- Landlord referrals
- Community and faith based organizations
- Canvassing (employee, contracted)
- Vehicle advertisement signs
- Global (mass mail, radio)
- Focus Group/targeting (mobile home parks, canvassing)
- Micro (random, walk-ins, call-ins)
- Phone calling (e.g., heap clients, etc.)
- Mass mailing (targeted areas)
- Clinics
- Events
- Surveys

Outreach Scenarios

- 1) Agency initiates (workshop, phone, canvassing) – direct client contact
- 2) Agency initiates (ad, flyer, mailer) – no direct client contact
- 3) Client initiates (cold call, referral, website)

Prescreen

Name, address (mailing and service), city, state, zip, phone, income (source and amount) household size, immigration status, own/rent, HUD unit, dwelling type, age of dwelling, primary heating source.

Eligibility Determination

Collect, verify & file eligibility information & documentation on both client & dwelling

- Client – name, address, city, state, zip, phone, household size, income (source and amount), Social Security Number, immigration status, signed application, demographic info, utility info, other agency info, previously served/eligible under other program, ages of family members, energy burden, priority points, other agency requirements (photo ID).
- Dwelling – previously weatherized, property owner waiver or landlord agreement (owner's consent to work on the dwelling), HUD info (a HUD building), characteristics – age of dwelling, appliances, type – multi (# of units), other agency/utility leveraging, valid place of service.

Assessments

Determining what needs to be done to a dwelling & what may be done to a dwelling.

Methods

1. At time of identification and outreach stage (door-to-door, multi, clinic, etc)
2. By an assessor (part of a work crew or not part of a work crew)
 - A. At the time of a scheduled assessment (crew & other services scheduled after assessment completed & materials available)
 - B. At the time of a scheduled job (crew has sufficient materials on board to anticipate completion of job as a result of assessment) other services may be scheduled after.
 - C. Unscheduled visit to homes.

Considerations

May be combined/leveraged with another service
Within scope of contracts & standards

Post Assessment -- A

For assessments not done at the same time as work a number of actions may take place.

1. Materials ordered
2. Hazards repaired by outside source (land lord, utility, etc)
3. Subcontractors scheduled
4. Permits obtained
5. Landlord permission/explanation
6. Landlord/property management coordination
7. Job or work order prepared
8. Leveraging coordination
9. Estimate/prioritize based on available funding
10. May be assigned to a contract
11. Crew size/composition considered for re-scheduling
12. Time estimate for re-scheduling

1,5,6,7,8,9,10,11 can happen during assessments if you are taking approach B.

Prioritize/Schedule

Prioritize service delivery based on:

- Client need (kids, urgency, etc)
- Contract/Priority Plan
- Geographical concentration
- Intake date (re-certification)
- Leveraging opportunity
- Estimate of cost & remaining dollars
- Hazard & safety
- Disaster Victims

Scheduling

Scheduling is the coordination of 2 or more parties being in the same place at the same time and may occur at a number of different points or steps in the entire process.

Types of appointments (and/or application status)

- Intake
- Assessment & Combustion Appliance Safety, client education
- Vendor/subcontractor work
- Reassessment (CAS/Fails, landlord activity, hazards)
- Utility work
- Work by crew
- Post weatherization inspection
- 3rd party inspection
- Heating & cooling (usually a different crew)
- Non-CSD services (leveraging)
- Permit inspections
- Title 24
- Monitor (csd)
- Landlord meeting
- Call back
- Coordination with property management (consideration)
- Bulk assessments multi
- Adult responsible
- Special orders
- Lead certification client education

Delivery models

1. All in-house delivery
2. All subcontractor delivery
3. Combination in-house and subcontract

Installation of Measures

Crew completes work identified in assessment. Covers weatherization, heating & cooling services, vendor/subcontract work that may be staged. Following actions may take place:

1. Materials (both special order/stock) issued
2. Coordination of separate elements or phases of job
3. Coordination/leveraging
4. Assignment to contract
5. Completion certification by client
6. Measure installation

Other Inspection

- Building inspector for permits
- Voluntary inspections by agencies above the 25% required by CSD.
- Home Energy Rating System (HERS) Rater

Post Weatherization inspection

Mandatory inspection of 25% of completed units. May result in call back or re-weatherization.

3rd Party Inspection

Debits and credits may occur here.

Customer Call backs

Additional work identified in course of inspection or post weatherization inspection or customer call/correction. May be additional instance of a measure already billed or new work not billed. May come before or after reporting/billing.

Customer Initiated

New measure installation per customer's request.

Crew Payment models

1. Piece work
2. Hourly
3. Mix of piece & hourly
4. Subcontractor
5. Salary

Reporting/Billing

Covers measures, expenses and demographics.

CSD Monitoring and/or Audit Visit